

**Amendments to the Claims**

1. **(Currently Amended)** A computer system comprising:
  - a processor;
  - a memory, coupled to the processor, and storing instructions executable on the processor, the instructions comprising
    - a forecast series creation set of instructions, wherein a forecast series associated with the forecast series creation set of instructions comprises a set of parameters that define attributes of forecasts that are created from the forecast series, wherein the set of parameters
      - identify hierarchy data defining a hierarchy structure of an organization, including data identifying a hierarchical position of each member of the organization,
      - identify an acceptable range of dates over which forecasts generated from the forecast series cover,
      - identify members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy,
      - identify forecast data to be automatically analyzed to generate forecasts from the forecast series,
      - identify a visibility mode for forecasts generated from the forecast series,
    - are employed to generate a forecast series comprising the identity of the hierarchy data, the identity of the acceptable range of dates, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request;

an opportunity and revenue scheduling creation set of instructions to identify forecast data;

~~a determining set of instructions to determine whether the forecast series is valid for forecast purposes, wherein said determining is based on a user input;~~ and

a forecast creation set of instructions that define attributes of a particular forecast, wherein the attributes fall within the set of parameters comprised in the forecast series, to generate the particular forecast ~~after determining that the forecast series is valid for forecast purposes.~~

2. (Previously Presented) The computer system of claim 1, wherein the hierarchy structure comprises a plurality of management levels, the forecast series creation set of instructions further comprises instructions to define visibility rules that specify the forecast data that are visible to each management level of the organization to be stored on the storage device, and

include the visibility rules in the forecast series, and

the forecast creation set of instructions further comprises instructions to generate a forecast for any management level of the organization, wherein each forecast that is generated is based on forecast data that are visible to the management level for which that forecast corresponds as specified by the visibility rules.

3. (Previously Presented) The computer system of claim 2, wherein a forecast is generated for a manager, and

the visibility rules include a maximum hierarchy depth search value n defining a search scope such that the forecast generated for the manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both

subordinate to the manager and occupy a management level in the hierarchy that is  $\leq n$  levels below a management level occupied by the manager.

4. (Canceled)

5. (Previously Presented) The computer system of claim 1 wherein the opportunity and revenue scheduling creation set of instructions further comprises instructions to enable a member of the organization to submit a forecast to a superior; and prevent the member from modifying the forecast after it has been submitted.

6. (Previously Presented) The computer system of claim 5, wherein the forecast creation set of instructions further comprises instructions to present forecast data in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member.

7 - 11. (Canceled)

12. **(Currently Amended)** A computer system comprising:  
a processor;  
a memory, coupled to the processor, and storing instructions executable on the processor, the instructions comprising  
a forecast series creation set of instructions, wherein a forecast series associated with the forecast series creation set of instructions comprises a set of parameters that define attributes of forecasts that are created from the forecast series, wherein the set of parameters identify hierarchy data defining members of an organization and a hierarchical position of each member,  
determine an identity of a current forecast participant who is a member of the organization,  
identify members of the organization who are subordinate to the current forecast participant based on the hierarchy data,

identify an acceptable range of dates over which forecasts generated from the forecast series cover,

identify members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy,

identify forecast data to be automatically analyzed to generate the forecasts from the forecast series,

identify a visibility mode for the forecasts generated from the forecast series,

are employed to generate a forecast series comprising the identity of the hierarchy data, the identity of the current forecast participant, the identity of members of the organization who are subordinate to the current forecast participant, the identity of the acceptable range of dates, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request;

an opportunity and revenue scheduling creation set of instructions comprising instructions to identify forecast data corresponding to the members of the organization;

**~~a determining set of instructions to determine whether the forecast series is valid for forecast purposes, wherein said determining is based on a user input;~~ and**

a forecast creation set of instructions that define attributes of a particular forecast, wherein the attributes fall within the set of parameters comprised in the forecast series, the forecast creation set of instructions comprising instructions to generate forecasts for one or more members of the organization who are identified as being subordinate to the current

forecast participant, using the forecast series, ~~after determining that the forecast series is valid for forecast purposes,~~ and

present forecast data to the current forecast participant.

13. (Previously Presented) The computer system of claim 12, wherein the current forecast participant is a manager whose forecast is determined, at least in part, on forecasts that are submitted by one or more selected members of the organization who are subordinate to the manager, and the forecast creation set of instructions further comprises instructions to automatically generate a forecast for any member among said one or more selected members who has yet to submit a forecast, and generate a forecast for the manager based on a combination of forecasts submitted by said one or more selected members and any forecast that is automatically generated.
14. (Previously Presented) The computer system of claim 13 wherein the forecast creation set of instructions further comprises instructions to automatically calculate forecasts for said one or more selected members of the organization who are subordinate to the manager and have not submitted their forecast in a recursive manner from lower levels to higher levels in the organization's hierarchy, wherein the manager occupies at least a second level of management in the organization's hierarchy.

15. **(Currently Amended)** A system comprising:
  - a processor;
  - a memory, coupled to the processor, and storing instructions executable on the processor, the instructions comprising
    - a forecast series creation set of instructions, wherein a forecast series associated with the forecast series creation set of instructions comprises a set of parameters that define attributes of forecasts that are created from the forecast series, wherein the set of parameters

identify hierarchy data defining a hierarchy structure of an organization, including data identifying a hierarchical position of members of the organization,

identify rules that specify forecast data that are visible to each member of the organization,

identify an acceptable range of dates over which forecasts generated from the forecast series cover,

identify members of the organization to be included in the forecast, the members derived from the hierarchy,

identify forecast data to be automatically analyzed to generate forecasts from the forecast series,

identify a visibility mode for forecasts generated from the forecast series,

are employed to generate a forecast series comprising the identity of the hierarchy data, the identity of the rules, the identity of the acceptable range of dates, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request;

an opportunity and revenue scheduling creation set of instructions to send data comprising a set of interactive HTML components via a computer network to a client, a portion of which enable forecast data corresponding to members of the organization to be entered via the client;

**~~a determining set of instructions to determine whether the forecast series is valid for forecast purposes, wherein said determining is based on a user input;~~ and**

a forecast creation set of instructions that define attributes of a particular forecast, wherein the attributes fall within the set of parameters comprised in the forecast series to generate, ~~after determining that the forecast series is valid for forecast purposes~~, the particular forecast for members of the organization using the forecast series, wherein each forecast is generated based on forecast data that are visible to corresponding members according to the visibility rules, and

send forecast data corresponding to the forecast to the client to be viewed by a user through use of the set of interactive HTML components.

16. (Previously Presented) The system of claim 15, wherein the hierarchy structure comprises a plurality of management levels, the forecast series creation set of instructions further comprises instructions to define visibility rules that specify the forecast data that are visible to each management level of the organization, and include the visibility rules in the forecast series, and the forecast creation set of instructions further comprises instructions to generate a forecast for any management level of the organization, wherein each forecast that is generated is based on forecast data that are visible to the management level for which that forecast corresponds as specified by the visibility rules.

17. (Previously Presented) The system of claim 15, wherein a forecast is generated for a manager, and the visibility rules include a maximum hierarchy depth search value  $n$  defining a search scope such that the forecast generated for the manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the

hierarchy that is  $\leq n$  levels below a management level occupied by the manager.

18. (Canceled)

19. (Previously Presented) The system of claim 15, wherein the forecast creation set of instructions further comprises instructions to:

enable a member of the organization to submit a forecast to a superior; and prevent the member from modifying the forecast after it has been submitted.

20. (Previously Presented) The system of claim 19 wherein the forecast creation set of instructions further comprises instructions to enable one or more of the superior to which the forecast was submitted and a system administrator to unsubmit the forecast such that the member who submitted that forecast is enabled to modify the forecast.

21. (Previously Presented) The system of claim 15, wherein the forecast creation set of instructions further comprises instructions to send data to the client, and the set of interactive HTML components are configured to present the forecast data in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member.

22 - 27. (Canceled)

28. **(Currently Amended)** A system comprising:  
a processor;  
a memory, coupled to the processor, and storing instructions executable on the processor, the instructions comprising  
a forecast series creation set of instructions, wherein a forecast series associated with the forecast series creation set of instructions comprises a set of parameters that define attributes of forecasts that are created from the forecast series, wherein the set of parameters

identify hierarchy data defining members of an organization and a hierarchical position held by each member to be stored in a database,

determine an identity of a current forecast participant who is a member of the organization and using the client,

identify members of the organization who are subordinate to the current forecast participant based on the hierarchy data,

identify an acceptable range of dates over which forecasts generated from the forecast series cover,

identify members of the organization to be included in the forecast, the members derived from the hierarchy,

identify forecast data to be automatically analyzed to generate the forecasts from the forecast series,

identify a visibility mode for the forecasts generated from the forecast series,

are employed to generate a forecast series comprising the identity of the current forecast participant, the identity of members of the organization who are subordinate to the current forecast participant, the identity of the acceptable range of dates, the identity of members of the organization to be included in the forecast, the identity of forecast data to be automatically analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request;

an opportunity and revenue scheduling creation set of instructions to send data corresponding to a set of interactive HTML components via a computer network to a client that enable forecast data corresponding to members of the organization to be entered by a user of the client;

~~a determining set of instructions to determine whether the forecast series is valid for forecast purposes, wherein said determining is based on a user input; and~~

a forecast creation set of instructions that define attributes of a particular forecast, wherein the attributes fall within the set of parameters comprised in the forecast series to generate forecasts, using the forecast series, ~~after determining that the forecast series is valid for forecast purposes~~, for one or more members of the organization who are identified as being subordinate to the current forecast participant, and send forecast data to the client to be displayed to the user via the set of interactive HTML components.

29. (Previously Presented) The system of claim 28, wherein the current forecast participant is a manager whose forecast is determined, at least in part, on forecasts that are submitted by one or more selected members of the organization who are subordinate to the manager, and the forecast creation set of instructions further comprises instructions to automatically generate a forecast for any member among said one or more selected members who has yet to submit a forecast, and generate a forecast for the manager based on a combination of forecasts submitted by said one or more selected members and any forecast that is automatically generated.
30. (Previously Presented) The system of claim 29, wherein the forecast creation set of instructions further comprises instructions to automatically calculate forecasts for said one or more selected members of the organization who are subordinate to the manager and have not submitted their forecast in a recursive manner from lower levels to higher levels in the organization's hierarchy, wherein the manager occupies at least a second level of management in the organization's hierarchy.

31 - 44. (Canceled)

45. **(Currently Amended)** A computer implemented method comprising:  
receiving an identification of hierarchy data defining a hierarchy structure of an organization, including data identifying a hierarchical position of each member of the organization;  
receiving an identification of an acceptable range of dates over which forecasts generated from a forecast series cover;  
receiving an identification of members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy;  
receiving an identification of forecast data to be automatically analyzed to generate the forecasts from the forecast series;  
receiving an identification of a visibility mode for the forecasts generated from the forecast series;  
generating the forecast series comprising the identity of the hierarchy data, the identity of the date and the period of time, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode, wherein  
said generating the forecast series is performed using a first computer processor;  
storing the forecast series, wherein  
the stored forecast series is accessible for use in generation of a particular forecast upon request, and  
said storing is performed using a memory coupled to the first computer processor;  
~~determining whether the forecast series is valid for forecast purposes,~~  
~~wherein said determining is based on a user input;~~ and  
generating the particular forecast using the forecast series wherein  
said generating the particular forecast is performed using a second computer processor,~~and~~

~~said generating the particular forecast is performed after determining that the forecast series is valid for forecast purposes.~~

46. (Previously Presented) The computer implemented method of claim 45, wherein the hierarchy structure comprises a plurality of management levels and further comprising:

receiving a definition of visibility rules that specify the forecast data that are visible to each management level of the organization to be stored on the storage device;

including the visibility rules in the forecast series; and

generating a forecast for any management level of the organization using the forecast series, wherein each forecast that is generated is based on forecast data that are visible to the management level for which that forecast corresponds as specified by the visibility rules, wherein  
said generating the forecast is performed using a third computer processor.

47. (Previously Presented) The computer implemented method of claim 45, further comprising presenting the forecast in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member, wherein

said presenting the forecast in a graphical format is performed using a display coupled to a third computer processor.

48. (Currently Amended) A machine-readable media on which a plurality of machine-executable instructions are stored that when executed by a machine generates forecast information corresponding to an organization by performing the operations of:

identifying hierarchy data defining a hierarchy structure of an organization, including data identifying a hierarchical position of each member of the organization;

identifying an acceptable range of dates over which forecasts generated from a forecast series cover;

identifying members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy;

identifying forecast data to be automatically analyzed to generate the forecasts from the forecast series;

identifying a visibility mode for the forecasts generated from the forecast series;

generating the forecast series comprising the identity of the hierarchy data, the identity of the date and the period of time, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode;

storing the forecast series, wherein the stored forecast series is accessible for use in generation of a particular forecast upon request;

~~determining whether the forecast series is valid for forecast purposes, wherein said determining is based on a user input; and~~

~~after determining that the forecast series is valid for forecast purposes,~~

generating the particular forecast using the forecast series.

49. (Canceled)

50. **(Currently Amended)** A computer implemented method comprising:

receiving an identification of hierarchy data defining a hierarchy structure of an organization, wherein

the hierarchy data comprises a hierarchical position of each member of the organization;

receiving an identification of an acceptable range of dates over which forecasts generated from a forecast series cover;

receiving an identification of members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy;

receiving an identification of forecast data to be automatically analyzed to generate the forecasts generated from the forecast series;

generating a forecast series comprising the identity of the hierarchy data, the identity of the acceptable range of dates, the identity of the members of the organization to be included in the forecast, and the identity of the forecast data to be automatically analyzed, wherein

said generating is performed using a first computer processor;

storing the forecast series, wherein

the stored forecast series is accessible for use in generation of a particular forecast upon request, and

said storing is performed using a memory coupled to the first computer processor;

**determining whether the forecast series is valid for forecast purposes,**

~~wherein said determining is based on a user input;~~ and

generating the particular forecast using the forecast series, wherein

said generating the particular forecast is performed using a second computer processor, ~~and~~

~~said generating the particular forecast is performed after determining that the forecast series is valid for forecast purposes.~~

51. (Currently Amended) The computer system of claim 1, wherein the forecast series is identified by a name,  
the hierarchy structure comprises a plurality of management levels,  
the forecast series further comprises visibility rules,  
the visibility rules include a maximum hierarchy depth search value n  
defining a search scope such that a forecast generated for a manager is  
generated from the manager's own forecast data and from forecast  
data corresponding to members of the organization who are defined to  
be both subordinate to the manager and occupy a management level in  
the hierarchy structure that is less than or equal to n levels below a  
management level occupied by the manager, and  
there is at least one level in the hierarchy structure that is below the last level  
included in the search scope.

52. (Canceled)

53. (Currently Amended) The computer system of claim 12, wherein the forecast series is identified by a name,  
the hierarchy data identifies a hierarchy comprising a plurality of  
management levels,

the forecast series further comprises visibility rules,  
the visibility rules include a maximum hierarchy depth search value n  
defining a search scope such that a forecast generated for a manager is  
generated from the manager's own forecast data and from forecast  
data corresponding to members of the organization who are defined to  
be both subordinate to the manager and occupy a management level in  
the hierarchy that is less than or equal to n levels below a management  
level occupied by the manager, and  
there is at least one level in the hierarchy that is below the last level included  
in the search scope.

54. (Canceled)
55. (Currently Amended) The system of claim 15, wherein  
the forecast series is identified by a name,  
the hierarchy structure comprises a plurality of management levels,  
the forecast series further comprises visibility rules,  
the visibility rules include a maximum hierarchy depth search value n  
defining a search scope such that a forecast generated for a manager is  
generated from the manager's own forecast data and from forecast  
data corresponding to members of the organization who are defined to  
be both subordinate to the manager and occupy a management level in  
the hierarchy structure that is less than or equal to n levels below a  
management level occupied by the manager, and  
there is at least one level in the hierarchy structure that is below the last level  
included in the search scope.
56. (Canceled)
57. (Currently Amended) The system of claim 28, wherein  
the forecast series is identified by a name,  
the hierarchy data identifies a hierarchy comprising a plurality of  
management levels,

the forecast series further comprises visibility rules,  
the visibility rules include a maximum hierarchy depth search value n  
defining a search scope such that a forecast generated for a manager is  
generated from the manager's own forecast data and from forecast  
data corresponding to members of the organization who are defined to  
be both subordinate to the manager and occupy a management level in  
the hierarchy that is less than or equal to n levels below a management  
level occupied by the manager, and  
there is at least one level in the hierarchy that is below the last level included  
in the search scope.

58. (Canceled)

59. (Previously Presented) The computer implemented method of claim 45, further comprising

identifying the forecast series by a name; and  
storing the name of the forecast series in association with the stored forecast series.

60. (Currently Amended) The computer implemented method of claim [[45]] 59,  
~~further comprising receiving a user input identifying the forecast series as no longer valid for the creation of forecasts wherein~~

the hierarchy structure comprises a plurality of management levels,  
the forecast series further comprises visibility rules,  
the visibility rules include a maximum hierarchy depth search value n  
defining a search scope such that a forecast generated for a manager is  
generated from the manager's own forecast data and from forecast  
data corresponding to members of the organization who are defined to  
be both subordinate to the manager and occupy a management level in  
the hierarchy structure that is less than or equal to n levels below a  
management level occupied by the manager, and  
there is at least one level in the hierarchy structure that is below the last level  
included in the search scope.

61. (Currently Amended) The machine-readable media of claim 48, wherein the forecast series is identified by a name,  
the hierarchy structure comprises a plurality of management levels,  
the forecast series further comprises visibility rules,  
the visibility rules include a maximum hierarchy depth search value n  
defining a search scope such that a forecast generated for a manager is  
generated from the manager's own forecast data and from forecast  
data corresponding to members of the organization who are defined to  
be both subordinate to the manager and occupy a management level in  
the hierarchy structure that is less than or equal to n levels below a  
management level occupied by the manager, and  
there is at least one level in the hierarchy structure that is below the last level  
included in the search scope.

62. (Canceled)

63. (Previously Presented) The computer implemented method of claim 50, further comprising  
identifying the forecast series by a name; and  
storing the name of the forecast series in association with the stored forecast series.

64. (Currently Amended) The computer implemented method of claim [[50]] 63  
~~further comprising receiving a user input identifying the forecast series as no longer valid for the creation of forecasts, wherein~~  
the hierarchy structure comprises a plurality of management levels,  
the forecast series further comprises visibility rules,  
the visibility rules include a maximum hierarchy depth search value n  
defining a search scope such that a forecast generated for a manager is  
generated from the manager's own forecast data and from forecast  
data corresponding to members of the organization who are defined to  
be both subordinate to the manager and occupy a management level in

the hierarchy structure that is less than or equal to n levels below a management level occupied by the manager, and  
there is at least one level in the hierarchy structure that is below the last level included in the search scope.

65. (New) The computer system of claim 1, wherein  
the forecast series further comprises a field indicating whether the forecast series  
is available for forecasting purposes.
66. (New) The computer system of claim 12, wherein  
the forecast series further comprises a field indicating whether the forecast series  
is available for forecasting purposes.
67. (New) The system of claim 15, wherein  
the forecast series further comprises a field indicating whether the forecast series  
is available for forecasting purposes.
68. (New) The system of claim 28, wherein  
the forecast series further comprises a field indicating whether the forecast series  
is available for forecasting purposes.
69. (New) The computer implemented method of claim 45, wherein  
the forecast series further comprises a field indicating whether the forecast series  
is available for forecasting purposes.
70. (New) The machine-readable media of claim 48, wherein  
the forecast series further comprises a field indicating whether the forecast series  
is available for forecasting purposes.
71. (New) The computer implemented method of claim 50, wherein  
the forecast series further comprises a field indicating whether the forecast series  
is available for forecasting purposes.